

Control Date

1. Introduction

The Control Date is the month established in which the eligibility specialist takes an action. The “**Control Date Summary**” window is used to create new Control Dates. You do not need to create a prospective control date.

Remember: The initial control date is established when registration occurs.

The “**Control Date Summary**” window is only used for ongoing cases, to create **Control Dates** for changes or renewals.

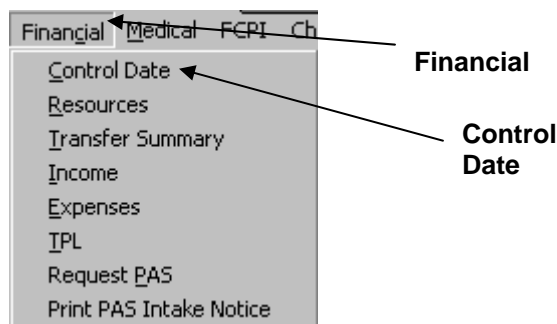
The “**Control Date Summary**” window will copy data from the closed **Control Date** to the new one. This eliminates the need to key in the same data more than once.



Only one control date can be open at one time.

2. Creating a Control Date

To access the “**Control Date Summary**” window on the main menu, click on “**Financial**”. On the drop down menu, select and click on “**Control Date**”.



The “**Control Date Summary**” window contains a single tab that displays the following:

- **Applicant List** Displays only the names of group members who are applying.
- **Control Date Summary** Displays all previously created **Control Dates**.

Control Date Summary (HOMER SIMPSON - APPLICANT - 100061751)

Control Date Creation

Applicant list: HOMER SIMPSON

Month	Type	Status	Created By	Date Created
02/01/2005	INITIAL	PENDING	RUDNICK, DAVID	02/03/2005

Reopen New Delete

Back Find OK Cancel Forward

Applicant List

Control Date Summary

The **Control Date Summary** contains the following fields:

- **Month** Displays the previous **Control Date(s)**.
- **Type** Displays the type of **Control Date** previously created (initial, change, renewal).
- **Status** Displays the status of the previously created **Control Dates**. Note: The status of **Closed** indicates the control month has been dispositioned.
- **Created By** Displays the name of the person who created the **Control Date**.
- **Date Created** Displays the date the previous **Control Date** was created.

Control Date Summary (HOMER SIMPSON - APPLICANT - 100061751)

Control Date Creation

Applicant list: HOMER SIMPSON

Month	Type	Status	Created By	Date Created
02/01/2005	INITIAL	PENDING	RUDNICK, DAVID	02/03/2005

Reopen New Delete

Back Find OK Cancel Forward

Month

Date Created

Created By

Status

Type

There are three buttons unique to the “**Control Date Creation**” tab.

- **Reopen** Used to change the status of a **Control Date** to “**Reopen**”.

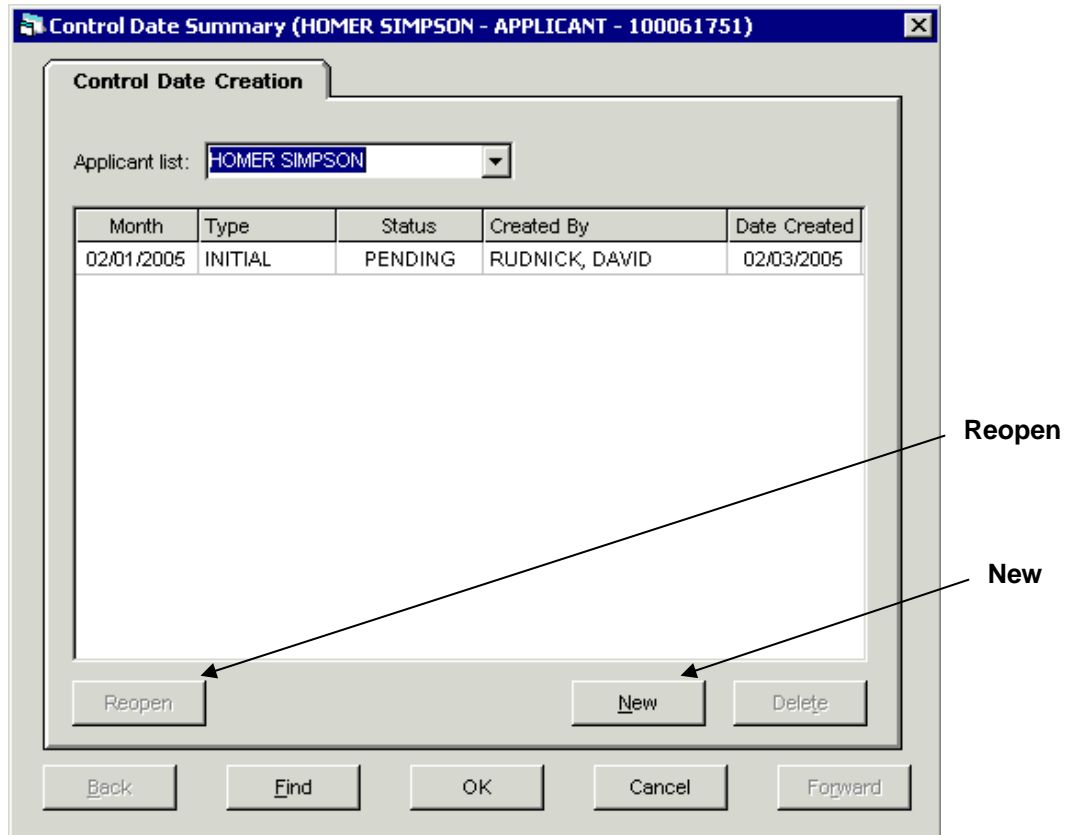
To re-open a control date:

Highlight the month to be re-opened. Click the **Re-open** button. You will receive a message to confirm. Click **Yes**, and the control date automatically re-opens.



This function is limited to supervisors, managers and the Technical Service Center.

- **New** Opens the “**Control Date Creation**” pop-up window.

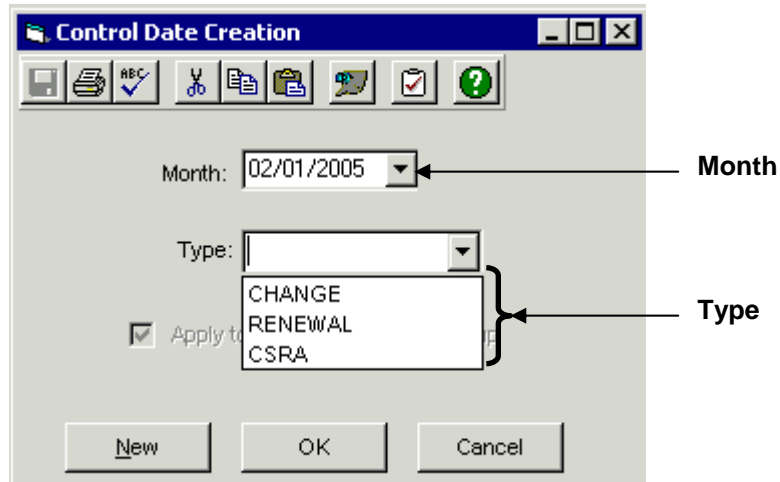


To access the “**Control Date Creation**” pop-up window, click “**New**”.

The “**Control Date Creation**” pop-up window allows you to create a new **Control Date**.

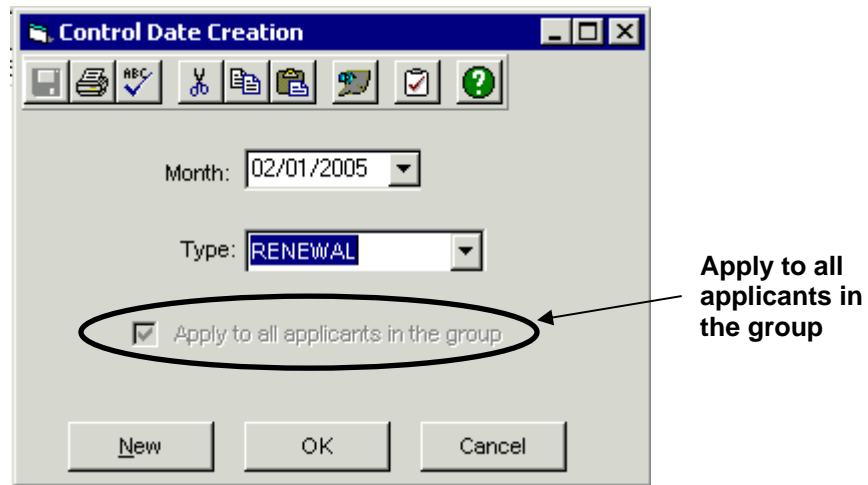
“**Control Date Creation**” pop-up window contains the following fields:

- **Month** Used to select, or enter, the month in which a new **Control Date** is required. This month is automatically filled with the current month. You may either use the drop down calendar to select the date, or type in the date. The **Control Date** will always be the first of the month. If you select the 17th, ACE will default back to the 1st.
- **Type** Allows you to select the type of **Control Date**. The types of control dates are **Change**, **CSRA** and **Renewal**.



- **Apply to all applicants in the group**

This field allows you to add the new control date to the cases of all group members who are customers. KidsCare automatically defaults to this, and it cannot be changed.

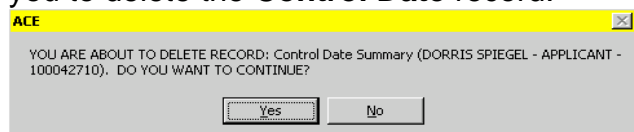


When you have selected the new **“Control Date”** and **“Type”**, click **“OK”** to close the pop-up window.

- **Delete**

To delete a **Control Date**, select the date to be deleted, causing it to be highlighted, and click the **“Delete”** button.

Displays the following window, which allows you to delete the **Control Date** record.





You cannot delete an initial or closed control date.

Control Date Summary (HOMER SIMPSON - APPLICANT - 100061751)

Control Date Creation

Applicant list: HOMER SIMPSON

Month	Type	Status	Created By	Date Created
02/01/2005	INITIAL	PENDING	RUDNICK, DAVID	02/03/2005

Reopen New Delete

Back Find OK Cancel Forward

Delete